

**PPMR
SERVICE & SUPPLY CONTRACTS CHECK LIST**

Contract No.	Award Date:
Dollar value Total Value: Base Year: Delivery Order No.	Contract Options - Value Option 1 Option 2 Option 3 Option 4
Procurement Method (Negotiated/Sealed Bid)	Contract Type (FFP)
Business Size:	WO, (8a), SDB
Contractor Name	Contracting Officer
COR Name	COR Telephone number

ITEM	YES	NO	N/A
<u>Contract Folder</u>			
1. Labeling (and contract numbering)			
2. Contacts (Address Phone)			
3. File Folder Format in use			
4. Check list in place			
Comments:			

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SERVICE & SUPPLY CONTRACTS CHECK LIST (Continued)

PRE-SOLICITATION Acquisition Request items	YES	NO	N/A
1. AD-700			
2. Accounting Code			
3. Budget Object Code			
4. SOW			
5. Deliverables			
6. Cost Estimate			

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SERVICE & SUPPLY CONTRACTS CHECK LIST (Continued)

JUSTIFICATIONS AND CLEARANCES	YES	NO	N/A
1. Evidence of Market Research (FAR Part 10)			
2. JOFOC			
3. OSDBU & Determination of Set-aside			
4. 8(a) Offering Letter (FAR 19.804)			
5. Options (FAR 17.205)			
6. Not Using Sealed Bidding (FAR 6.401)			
7. Consulting/Advisory and Assistance Service Approval (FAR 37.205)			
8. IT Waiver (moratorium)			
9. GPO - For Printing			
10. Bid Sample (FAR 14.202-4)			
11. OGC (Legal)			
12. EEO Compliance (FAR 22.805)			
13. Determination of Contract Type (FAR Part 16)			
14. DOL - SF98			
15. Nonpersonal Services Determination (FAR 37.103)			
16. Former Employee, Approval to Contract (DR 5000-6)			
17. Commercial items (FAR 12)			
18. Performance Base Service Contract (FAR 37.6)			

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SOLICITATION PHASE	YES	NO	N/A
1. Standard Industrial Classification (SIC) and Product Service Code			
2. CBD (FAR Part 5)			
3. Bidders List (FAR 14.205 and 15.403)			
4. Source List - At lease one of each -- WOB, SDB Identifying HUBZone			
5. Solicitation			
6. Amendments			
7. Pre-Bid Pre-Proposal Conference (FAR 14.207 & 15.201 & 36.212)			
8. Source Selection Panel Designation & Instructions (FAR Part 15.3)			
9. Source Selection Plan			

PROPOSALS	YES	NO	N/A
1. Cost/Price Analysis/Deter. of Fair & Reasonable Price (FAR 15.4)			
2. Competitive Range Determination			
3. Negotiation Memoranda			
4. Bid Abstract/Summary of Offers			
5. Determination - Rejection of All Bids (FAR 14.404) - Rejection of All Proposals (FAR 15.608)			
6. Late Notice (FAR 14.304 & 15.412)			
7. Mistake in Bids - Determination (FAR 14.405)			

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AWARD DOCUMENTATION	YES	NO	N/A
1. Contract			
2. CBD award notice (FAR 5.303)			
3. SF-279			
4. Successful Proposal			
5. Section K (Reps & Certs) EFT, VETS-100 over \$25,000			
6. Unsuccessful Notification (FAR 15.503)			
7. Debriefing (FAR 15.505& 15.506)			
8. COR Designation			
9. Post Award Conference			

CONTRACT ADMINISTRATION	YES	NO	N/A
1. DOL Wage Determination Revisions (FAR 22.404)			
2. Option Years (FAR Part 17.2)			
3. Novation Agreement (Name Change) (FAR 42.12)			
4. Performance Evaluation by Program Staff (COR)			
5. Progress Reports			
MODIFICATIONS	YES	NO	N/A
1. AD-700			
2. Program Request			
3. Contractor's Proposal			
4. Technical Evaluation			
5. Price Reasonableness Determination			
6. Modifications (and back up documentation)			
7. SF-279			

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SERVICE & SUPPLY CONTRACTS CHECK LIST (Continued)

FINANCIAL MATTERS	YES	NO	N/A
1. Invoices and Payments			
2. Invoice and Payment Log with Accounting Information			
3. Assignment of Claims (FAR 32.8)			

CLOSE OUT	YES	NO	N/A
1. Evidence of Completion			
2. Letter to Contractor			
3. Letter From Contractor			
4. Memorandum to Budget/Finance			
5. COR Check list			
6. Contracting Officers Closing Memorandum			
7. Records Center transition			

SIMPLIFIED ACQUISITIONS CHECK LIST	
Purchase Order No.	Award Date:
Dollar value	Contract Officer
Contractor Name	Commodity
Requester (COR)	Requester(COR) Phone Number

SIMPLIFIED ACQUISITIONS	YES	NO	N/A
1. AD-700 Funding Information/Account Classification			
2. Method of Procurement			
3. Mandatory Source of Supply (FAR Part 8)			
4. Set-aside (FAR 13.105)			
5. Preference Program Type			
6. CBD (Min. Publicizing time (10 Days - FAR 5.203) Over \$25,000			
7. Solicitation/SOW/Amendments			
8. Clauses FAR 52.212-5			
9. Cancellations (FAR 13.302-4)			
10. Comparison of proposed price w/ prices in previous procurements Two or more offers/quotes received from different sources (Include Abstract of Quotes)			
11. Delivery Order/Purchase Order			
12. Conforming Order (Documentation in File)			
13. 281 Information/279 Information			
14. Documentation of Receipt of Goods and Services			
15. Contractor Certifications - EFT, VETS-100 over \$25,000			
16. Ratification Information			

**PURCHASE CARD/CONVENIENCE CHECK
CARDHOLDER INTERVIEW**

Cardholder's Name: _____

Single Purchase Limit: _____

Monthly Limit: _____

PURCHASE CARD/CONVENIENCE CHECK - CHECK LIST	YES	NO	N/A
Cardholder: Procurement Nonprocurement Convenience Checkwriter			
Training Received: PCMS/Micro-Purchase Guide Purchase Card Tutorial Video PCMS			
Purchase Card Log Available			
Reference Tools Available DR 5013-6 REE Manual 213.3M PCMS Micro-Purchase Guide PCMS Newsletters Cardholder PCMS Quick Guide for Reconciling Purchase Card Transactions Budget Object Classification Codes Definition of SF-281 Codes			
PCMS Usage			
LAPC Oversight			
Purchase Card File Secure			
Comments:			

PURCHASE CARD/CONVENIENCE CHECK - CHECK LIST
Purchase Card File Documentation

Vendor Name: _____ Dollar Amount: \$_____

PURCHASE CARD/CONVENIENCE CHECK ACTIONS	YES	NO	N/A
1. Type of Purchase: (Circle response) Purchase Card Convenience Check			
2. File documentation: (Circle response) <div style="display: flex; justify-content: space-between;"> <div> AD-700 AD-287-2 SF-1164 SF-182 AD-343 </div> <div> AD-343 Receipts Quotes Packing Slips Convenience Check Waiver No. </div> </div>			
3. Required Source			
4. Repetitive Buy			
5. Types of Transaction: (Circle response) <div style="display: flex; justify-content: space-between;"> <div> Supply Service Spot Cash Award </div> <div> Local Travel Tuition & Books Emergency Salary </div> </div>			
6. Notation of Goods or Services Received on Log			
7. Reconciliation Timely in PCMS			
8. Prohibited Source			
9. Transaction over Single Purchase Limit			

PURCHASE CARD/CONVENIENCE CHECK - CHECK LIST

Purchase Card File Documentation (continued)

10. Type of Unauthorized Use: (Circle response)

Cash Advance or Travel Advances

Long term leases/rentals

Airline, train, bus, or common carrier tickets, or individual
travel expenses

Major telephone systems

Allowing others to use card or account number

Fuel and related supplies and services

Circumventing thresholds

Purchase of hazardous items

Personal purchases/identification

Writing checks to self or for cash

Paying in advance for supplies or services, except when
authorized by law

Writing checks when vendor accepts purchase card

Failing to reconcile within 30 days

Other unauthorized purchases:

Greeting cards

Memberships in an individual's name

Insurance of items being shipped to or for the
Government

Shipment of household goods